

CONTINENTAL HOSPITALS- REVOLUTIONARY SUCCESS STORY

Continental Hospitals is a part of the Parkway Pantai Ltd, Singapore Enterprise, one of the region's largest integrated private healthcare groups with a network of 31 hospitals and more than 6,000 beds throughout Asia, including Singapore, Malaysia, Brunei, India, China and Vietnam. It is fully owned by IHH Healthcare Berhad, which is the second largest healthcare group in the world by market capitalisation and is dually listed on the Main Market of Bursa Malaysia and Main Board of SGX-ST.

Continental Hospitals is a 750-bed super specialty hospital dedicated to excellence in medical services. They provide the highest quality patient-centric care. Ever since they first opened their doors in March 2013, Continental Hospitals have been committed to defining new frontiers in healthcare by building an environment driven by interdisciplinary collaboration and innovative practice in the field of medicine.

Continental Hospitals has been accredited by Joint Commission International (JCI), USA - the highest body of accreditation in the world. Continental Hospitals is the first hospital in India, in the State of Telangana, and also the first multispecialty hospital (with Oncology) in the world to get the JCI accreditation in less than 2 years. It is also the first Hospital in the Indian subcontinent to obtain the "Gold Seal" in the first attempt. Continental Hospitals has also completed NABH Accreditation (highest accreditation in the country given to hospitals for quality care) in December 2014 (within less than 18 months). NABH accreditation is an important benchmark of quality and safety for patients.



Ramesh Krishnan
CEO India Operating Division, Parkway Pantai

How does Continental Hospitals fit in the overall India strategy for Parkway Pantai?

Parkway Pantai has been an established and recognized brand in Asia with 31 hospitals and 6000 beds across 10 countries and growing. We are known for our clinical excellence & patient centric services. Continental Hospitals has been the first among many hospitals that we acquired over the past 2 years in India with an intention to move into the Indian healthcare industry as a strategic operator having management control. Being a JCI accredited hospital with world class infrastructure, Continental Hospitals was an ideal platform to start our journey as an operator

in India, which we now consider as our home market.

Where do you see Continental Hospitals in 5 years?

The world class infrastructure is built out to house 750 beds. This coupled with the efforts we are putting in to bring in the best of clinical talent and technology upgradation will make Continental Hospitals a destination hospital for tertiary and quaternary care in the country.



Harish Manian
Regional COO, India Division, Parkway Pantai

How has your journey with Continental Hospitals shaped up?

The past 2 years have been very satisfying and the journey has given us reliable insights about Hyderabad and Telangana. We are grateful to the people of Hyderabad for making us one of the preferred healthcare providers in the city. In the shortest possible time, Continental Hospitals has become the testimony referral center of the city for complex clinical ailments in 30 different specializations and we are thankful to the clinical team at Continental Hospitals. We have been fortunate that the best clinical talent in Hyderabad has shown keen interest in our facility and delivered excellent care ever since its inception.

What are going to be your key areas of focus in the coming time?

In the coming year, we are devoting our attention to further develop and enhance capabilities in the Continental Transplant Programme. We plan to initiate Heart Transplantations as well as consolidate our position in Liver, Kidney and Bone Marrow Transplants. We will also be heavily investing in the latest technology to deliver the best possible experience to our customers, both national and international.

How has the growth of International Business in Continental Hospitals been?

Our International Business Center has seen a 3 fold increase in activity in the past one year. This is a testimonial of our clinical expertise armed with the latest technology and the highest qualified clinical talent. Continental Hospitals and Parkway Pantai along with the state govern-

ment endeavor to market Hyderabad as the preferred global destination for high quality tertiary medical care.

We have had some Government agreements for direct patients to be sent to Continental Hospitals which is a very good sign for us and also Hyderabad. We are also in the process of developing clinical talent in various countries and universities with the help of our existing medical expertise.

How do you foresee the way forward in Healthcare with the changing market dynamics?

This is the most vibrant phase in Indian Healthcare with constant changes occurring within the environment on a regular basis. The last few years have seen major International players/ brands enter India and trying to transform the way healthcare is delivered. We see three major factors that will influence the industry in the coming year, these being Technology, Regulation and Clinical Innovation. We will see healthcare organizations partnering with Technology companies to enhance patient experience and outcomes. Similarly, regulatory changes will keep the environment dynamic and help healthcare innovation.

What are the key points an organization like yours has to deliver to ensure excellence in healthcare delivery?

To deliver services that are consistently of excellent quality, we strive to standardize our internal processes and systems. Parkway Pantai Hospitals develop and employ processes that can be scaled up and replicated across the network. This increases convenience for the patients and gains loyalty as well.

We have implemented our processes after careful studying by our experienced management leaders to ensure maximum efficiency and monitoring. Factors like emergency response time, turnaround of lab and radiology reports and discharge times are constantly monitored to identify and correct any gaps in efficiency.

Recently, our Central Sterile Services Department received the Asia Pacific Society of Infection Control Center of Excellence Award after nearly two years of audit process. This award promotes use of standards and best practices to deliver quality disinfection and sterilization services for our patients. We are also in the process of certifying our Operation Theatres as Green OT from Bureau Veritas. It covers parameters like air flow inside the OT, standardized OT set up and anesthesia machines. The Green OT certification would also ensure that emission of carbon dioxide, infrared rays and radiation are within permissible limits.



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Omega, the Right 'Difference' FOR CANCER CARE!

The vision of creating a world-class integrated health-care delivery system in our country gave birth to Omega Hospital in July 2010. This is a holistic healthcare destination where finest medical skills combined with compassionate care delivers excellent results. The hospital was born due to the zeal of dedicated physicians, for offering exceptional patient care, to fill the gap arising out of lack of comprehensive care for India's cancer patients.

Dr. Ch. Mohana Vamsy and his colleagues were involved in many brainstorming sessions and their efforts led to the inception of a leading cancer treatment centre and care provider in the world. Thus, Omega was started leading to a one-of-its-kind Cancer care hospital in India, available at a reasonable cost for cancer patients from all sections of the society.

THE SERVICE

There are advanced cancer treatment protocols followed at Omega employing the latest technology and equipment, which is offered with care and compassion. The hospital has Quality Care, Leadership, Respect for Individuals' Rights, Hope, Partnership, Service to All, Safety and Security and Recognition as its basic pillars that has brought fame and success today!

BRILLIANT TEAM & THE STATISTIC SPEAK FOR ITSELF!

The team of Omega Hospital strives to achieve success with the concerted effort of world-renowned oncologists, nurses, respiratory therapists, critical care specialists, pharmacists, physical therapists and dietitians. An independent and dedicated unit of the Hyderabad Institute of Oncology, Omega Hospitals is supported by more than 500 employees. There are 89,500 patient care visits every year, which includes 24,500 admissions. There have been 65,000 total outpatient visits to the hospital, as well as 1069 same day surgery visits and 1760 major surgeries performed here annually.

INFRASTRUCTURE

With an extensive built up area of 3,200 sq. meters, Omega Hospitals has deployed some of the latest medical equipment and skilled technicians. The competency level of the hospital's performance has been achieved with dedicated round-the clock cancer care, Surgical and Medical ICU units. In fact, Omega Hospitals was the first in South India to install the VMAT Radiation technology for superior care.

CUTTING-EDGE TECHNOLOGIES

"Smart" IV pumps, online check-ups, VMAT Radiation technology, one of the first in the region to have digital Mammography with Breast Tomosynthesis, highly advanced cancer therapy with latest Cyberknife technology are some of the latest advancements that has cata-



Robotic CYBERKNIFE vsr



3D Mammography



Dr Mohana Vamsy

puted Omega as leading care provider of cancer treatments and healthcare. The Department of Nuclear Medicine & PET CT has advanced facilities.

PET-CT

Most modern Positron Emission Tomography and CT technology which provides highly sensitive information about various cancers in their early direction, follow up and assessment of treatment response after chemotherapy and radiotherapy.

DUAL HEAD SPECT GAMMA CAMERA

State of the art Dual Head Scintillation Gamma Camera with tomographic features, it is capable of performing whole body skeletal survey for early detection of bone secondaries in cancer.

THYROID CANCER RADIO ACTIVE IODINE TREATMENT

This world renowned and practiced treatment facility is available with a most modern radio iodine therapy ward constructed to treat differentiated thyroid cancer cases with high doses of Iodine 131 radioactive iodine obtained from Board of Radiation and Isotope Technology, Baba Atomic Research Centre, Mumbai.

THE FOUNDER-PIONEER

Dr. Vamsy and his team of oncologists are regarded as visionary advocates for their innovative and steadfast approach to informing, empowering, and treating patients with cancer and providing the latest and the most advanced cancer care treatment in India. Dr. Ch. Mohana Vamsy says, "Omega Hospitals believes in making a difference that goes beyond the four walls of the hospital. Omega Hospital offers a wide range of free as well as low-cost screenings and tests, and provides support groups and community health education."

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Visit: www.omegahospitals.com

RESEARCH METHODOLOGY

The objective of this research was to arrive at a list of Top Super Specialty Hospitals in India. The specialties that we included in the research were Cardio Sciences, Gastroenterology and Hepatology, Urology, Nephrology, Neuro Sciences, Oncology, Gynaecology & Obstetrics, Paediatrics & Emergency & Trauma.

The research had 3 major modules i.e. Desk Research, Factual survey & Perceptual Rating survey followed by scientifically developed analysis & ranking process.

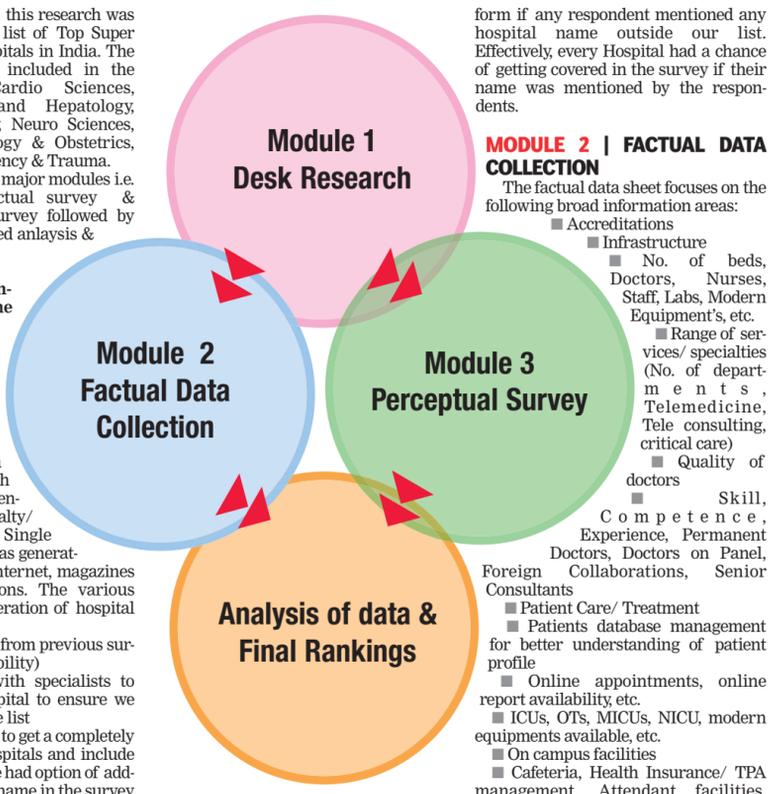
Fieldwork was conducted beginning the 2nd week of November 2016 to 4th week of January 2017.

MODULE 1 | DESK RESEARCH

The module 1 was a secondary research module. A comprehensive list of Multi-specialty/ Super Specialty/ Single Specialty Hospitals was generated with the help of internet, magazines and other publications. The various sources used for generation of hospital list included:

- List of Hospitals from previous surveys (based on availability)
- A discussion with specialists to add/ delete any Hospital to ensure we have a comprehensive list

As it is not possible to get a completely exhaustive list of hospitals and include them in the survey, we had option of adding any new hospital name in the survey



form if any respondent mentioned any hospital name outside our list. Effectively, every Hospital had a chance of getting covered in the survey if their name was mentioned by the respondents.

MODULE 2 | FACTUAL DATA COLLECTION

The factual data sheet focuses on the following broad information areas:

- Accreditations
- Infrastructure
- No. of beds, Doctors, Nurses, Staff, Labs, Modern Equipment's, etc.
- Range of services/ specialties (No. of departments, Telemedicine, Tele consulting, critical care)
- Quality of doctors
- Skill, Experience, Permanent Doctors, Doctors on Panel, Foreign Collaborations, Senior Consultants
- Patient Care/ Treatment
- Patients database management for better understanding of patient profile
- Online appointments, online report availability, etc.
- ICUs, OTs, MICUs, NICU, modern equipments available, etc.
- On campus facilities
- Cafeteria, Health Insurance/ TPA management, Attendant facilities,

Chemist (on campus pharmacy), etc.

- Ease of payment facilities - online, credit card acceptance.
- Diagnostic facilities
- Path labs, equipments available, user friendly reports
- Best practices followed/ research & innovations
- Best practices /developments/ innovations that have been introduced in past few years
- Ethical committee

MODULE 3 | PERCEPTUAL SURVEY

In the perceptual survey module for Top Multi Specialty/ Super Specialty/ Single Specialty Hospitals, a structured Questionnaire was administered to selected respondents including GPs/ CPs, Specialists (Cardiologists, Gastroenterologists, Urologists, Neurologists, Nephrologists, Oncologists, Paediatrician, Gynaecologists & Obstetrician, Emergency & Trauma care specialist). We feel experience/ perceptions of patients & their care givers with hospitals is equally important, so we included Patients (who got admitted in any private hospital in last 6 months atleast for 5 days), Care givers (Family Member of the patient who takes all decisions) in our survey. A total sample survey of 1540 was conducted in across 10 cities viz Delhi, Mumbai, Kolkata, Chennai, Bangalore, Hyderabad, Ahmedabad, Bhubaneswar, Pune & Lucknow. The respondents were asked to rank & rate top five multispecialty hospitals in India, top five multi Specialty hospitals in their cities, top five hospitals in their respective specialties (both at national as well city level). The parameters used

for ratings were: Value for Money, Team of Consultants, Quality of treatment - both OPD & In-patient, Infrastructure, Hygiene & Cleanliness, Facilities & Public convenience, Innovation & research facilities, Overall Brand Legacy.

ANALYSIS & FINAL RANKING OF HOSPITALS

A robust approach was followed to arrive at the final rankings. The step by step process is given below:

- Factual Score
- The information collected corresponding to similar parameters as in the perceptual survey
- A detailed scoring system has been developed for each parameter
- After assigning scores to each parameter, raw scores were calculated
- The raw scores were weighted by their importance to arrive at weighted scores
- The final entity score was calculated as in the perception survey
- Perceptual Score
- Ratings on various parameters for each entities
- Calculating importance of various parameters to arrive at weights for each parameter - we use a regression model to arrive at the importance of various parameters
- Calculation of raw scores and weighted scores for each parameter
- Calculation of overall score for each hospitals using importance weightage
- The final score for a hospital and a weighted average of respective hospitals Perception Score and Factual Score - equal weightage given to both

Some caveats/assumptions:

- Government or partly Govt. funded, Not for profit, and Charitable trust hospitals like AIIMS, CMC, Adyar Cancer Institute, TATA Memorial Hospital, Basavataarakam Indo American Cancer Hospital & Research

Institute, Kanchi Kamakoti Childs Trust Hospital, Madras Medical Mission, The Gujarat Cancer & Research Institute etc. were not included in the ranking, considering them as a different league of hospitals due to their legacy, huge infrastructure, sheer size of procedures performed at highly subsidized treatment cost, etc. We feel they are not directly comparable with other hospitals, thus have limited this survey to private/ corporate tie up hospitals.

- Best efforts were made to reach maximum hospitals across specialties; however, any hospital that did not send complete "Fact-Sheet" within the allotted time was assigned an average Factual score for calculating their overall ranking
- Any entity which expressly stated that it did not wish to participate in the survey was excluded from the survey

Note: Present survey has been conducted by an independent Research Agency named i3 Research Consultants using stated methodology for arriving at given rankings.

About i3 Research Consultants (i3RC)

i3 Research Consultants (i3RC) is a boutique research & consultancy firm that is focussed on offering Superior Client Service, Strategic Insights, Innovation, Quality & Commitment. i3RC has a young and dynamic team of researchers who are very passionate about their work and are always willing to put that extra effort to make every project a great success. In addition i3RC has a team of highly experienced industry experts as consultants who provide their expertise for specific projects. i3RC is a full member of MRSI and follow MRSI code of ethics while conducting every research project. Given their commitment to quality, i3RC has developed a 3 tier and multi stage quality control system to deliver excellent quality.

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